

October 2011 Examination – CF5 Integrated Financial Planning

Syllabus learning outcomes being examined

1.	(a) 1. Establish the relationship between the client and the adviser; 2. Gather data.
	(b) 3. Identify needs and possible solutions.
	(c) 2. Gather data.
	(d) 3. Identify needs and possible solutions; 4. Make recommendations.
	(e) 4. Make recommendations.
2.	(a) 3. Identify needs and possible solutions; 4. Make recommendations.
	(b) 3. Identify needs and possible solutions.
	(c) 3. Identify needs and possible solutions; 4. Make recommendations.
	(d) 4. Make recommendations.
	(e) 5. Monitor clients' circumstances.